INSTRUCTIONAL DESIGN STRATEGIES
Design Learner-centric E-learning Courses

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Rapid eLearning Solutions
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Unit 1
Introduction

What a wonderful beginning to
Strategies are synonymous with a plan of action, a game plan, or a systematic method of performing a task; indeed, it is this and more. In pedagogical terms, it refers to the approach that is used to teach, to achieve the learning objectives of a course.

In more recent times, with the advent of eLearning, instructional strategies have also been used in eLearning design and are known to enhance both instruction and learning. While the strategies themselves are not different from the instructional strategies of classroom training, they are adapted to the new environment. In fact, eLearning courses and programs are considered unsuccessful if they are NOT based on sound instructional design strategies.

This eBook aims to provide all those involved in the eLearning development process (stakeholders, trainers and subject matter experts), valuable information on instructional design strategies, and in doing so, hopes to enable them to understand and contribute immensely to their eLearning projects.

This eBook has 4 units that will help you:

- Understand what an instructional design strategy is
- Differentiate between an instructional design strategy and model
- Understand the importance of instructional design strategies
- Gain insights into the popular instructional design strategies
- Select the right instructional design strategy based on your learning requirements
What is a Strategy?

A strategy is a long-term game plan or high-level plan to achieve one or more goals through the efficient and effective use of available resources. The steps involved to develop a strategy include setting a goal, determining actions to meet the goal, and mobilizing the available and necessary resources to achieve that goal.

In military terms, a strategy is the utilization of all the nation’s forces during both peace and war, through large-scale, long-range planning and development, to ensure security and victory (Random House Dictionary).

In business terms, a strategy refers to the rules that a player uses to choose between the available actionable options.
What is an Instructional Strategy?

An instructional strategy is a high-level plan of how a subject must be taught. Like any other strategy, the instructional design strategy begins with setting up clear goals, determining the actions that must be taken to meet these goals, and making use of a variety of resources, techniques and devices to achieve these goals.

Instructional design strategies are of two types – instructional strategy and media strategy – both of which contribute to the effectiveness of a course.

The resources that are used to achieve these goals include the learning devices, presentation patterns, course structure and features, and the type of media that is used.
The Difference Between ID Models and Strategies

Instructional design strategies are not the same as instructional design models, and the terms cannot be interchanged.

An instructional design model is a set of guidelines that helps instructional designers approach, structure, and design a course based on sound instructional design principles.

Several models are available, and organizations choose one that suits their needs and is compatible with the way their organization functions.

ADDIE, GAGNE, Dick & Carey, and SAM are the most popular models.

An instructional design strategy is a high-level approach of how to teach a subject, to an audience in a learning environment.

It refers to the methods, techniques, and devices used to instruct learners. Popular ID strategies include guided learning, scenario-based learning, game-based learning, case studies, and more.

Some important factors that are taken into consideration when deciding on the best strategy are the subject, audience, and the learning environment.
A Brief Look at Some Popular ID Models

**ADDIE**

This very systematic model consists of 5 interrelated and essential components to instruction – Analysis, Design, Development, Implementation, and Evaluation.

The ADDIE model can be used for any kind of learning, and provides opportunities to re-evaluate the learning goals and outcomes, at any stage. However, the model is not iterative; and because each of the 5 phases (components) are interrelated, changes made in one phase will inadvertently effect the other phases as well.

Work progresses based on assumptions made of the client’s and learner’s requirements; when these assumptions are proved wrong, the course must be reworked on – leading to a loss of time.

**Gagne’s Nine-Step Model**

As per Gagne’s nine-step model, every learning activity includes 9 events that must occur one after another. Each of these events will, when experienced by the learner, elicit a response that leads to learning. The 9 events and their corresponding responses are as follows:

1. Gaining attention (reception)
2. Informing learners of the objective (expectancy)
3. Stimulating recall of prior learning (retrieval)
4. Presenting the stimulus (selective perception)
5. Providing learning guidance (semantic encoding)
6. Eliciting performance (responding)
7. Providing feedback (reinforcement)
8. Assessing performance (retrieval)
9. Enhancing retention and transfer (generalization)

This is a systemic and student-centred model that covers all the aspects of learning. It also helps instructors to systematically organize and structure the lesson plan, although there is the fear that instructors might view this method as being too rigid for their liking.
According to the Dick and Carey model, all the components that are involved in the instructional process are interrelated and work together to produce the desired results. These components include the instructor, learners, study material and resources, activities, and delivery system. The steps are as follows:

1. Identify the skills, knowledge, and/or attitudes that must be acquired
2. Conduct an instructional analysis that identifies what must be learned to perform a task
3. Analyze the learners and learning settings
4. Identify learning goals
5. Develop assessment tools
6. Develop an instructional strategy
7. Choose instructional methodologies
8. Develop and conduct formative assessments
9. Revise instruction
10. Develop and conduct summative assessments

These ten steps can be summarized as identify, analyse, develop, revise, assess.
The SAM model of instructional design is an agile model that is based on creating a quick and successful course through a series of iterations that occur by repeatedly looking at the design, development, implementation, and evaluation phases, so that any changes that need to be done can be implemented immediately – saving valuable time and money.

There are three phases in the SAM model – the preparation phase, iterative design phase, and iterative development phase.

The two main distinctive features that make this model stand out from the other models are that first, the preparation phase only involves collecting all the relevant material before quickly moving onto the iterative design phase. A laborious and arduous analysis of existing content is not done.

Second, the model does not complete one phase before moving to the next. Iterations are made along the way at every phase immediately and whenever necessary; so, no time is lost along the way.
The Importance of Instructional Design Strategies in E-learning Design

- The use of instructional design strategies plays a very vital role in eLearning. An eLearning environment is void of an instructor’s physical presence that is replaced by collaborative learning, and instant access to a large volume of freely-available knowledge. But utilizing this environment and the available resources is challenging and can impede the learning process if it is not based on a sound instructional design strategy.

- With eLearning, instructors must give up their roles as the sole owners and distributors of information and must be willing to release their control over the learning process; and learners must take charge of their own learning. Designing a course on a well-planned strategy will enable this change in roles for both the instructor, as well as the learners.

- Appropriate design is the key to making an eLearning course successful. When courses are designed on instructional design strategies, learning objectives are easy to meet and accomplish.

It’s no doubt that in eLearning, instructional design strategies are used as tools to help instructional designers to design a successful course and facilitate learners in the learning process.

Let’s take a look at some popular ID strategies in the next unit.
Unit 2

ID Strategies for Effective results
GUIDED LEARNING

Guided learning uses learning agents (characters/avatars) to accompany learners through an online course. They guide learners through the course but let them take their own decisions. Individualized instruction enhances learners’ motivation, participation, and knowledge retention.

Characters/Avatars can be:
- People with organization-specific designations and roles learners can relate to such as a senior sales manager, a mentor, a subject matter expert, etc.
- Characters and/or inanimate objects that are personified

Every strategy uses elements or components that help deliver content. Let’s look at the elements involved in guided learning:
- Characters with audio narration
- Setting (location, time, and background narrative)

A few situations where guided learning can be used:
- To help new hires/juniors find their way through the training or a process
- Where learners are likely to face questions/doubts
- Where learners will appreciate reassurance and a personal connection with a figure of authority
- For subjects that require the use of a mentor or peer to enhance knowledge transfer
Types of training it is recommended for:

- Sales training – to address specific questions on overcoming customer objections, training reps on new sales tools, etc.
- Software training – to address learners’ concerns about the introduction of the new system, explain its benefits, and take them through the system
- Process training – to acclimatize learners with the new process and address queries
- Performance management training – to clarify learners’ queries regarding progression through their career paths, and explain the various benefits, appraisal system, and more

Guided learning can be used at the following levels of Bloom’s taxonomy*:

- Knowledge
- Comprehension
- Application
SCENARIO-BASED LEARNING

Scenario-based (problem-based) learning puts learners in situations where they learn by doing tasks or taking decisions. It helps build critical-thinking skills, and apply the knowledge gained directly on the job.

The situations mirror actual problems learners face in their daily jobs. The context of the scenario – the setting, characters, and issues encountered – play a crucial role in this strategy.

Elements involved:
- A storyline and characters
- Questions with enough choices to allow learners to explore all possible options and take decisions
- Feedback with a clear explanation of why the learner is right/wrong

Scenario-based learning can be used in situations where learners:
- Need to decide on the best course of action
- Have to apply rules/policies at work
- Have to be prepared to face uncertain circumstances that might unfold
SCENARIO-BASED LEARNING

Types of training it is recommended for:

- Compliance training – to help learners interpret and apply the applicable rules/policies to their work

- Sales training – to provide learners with hands-on experience in dealing with customers, answering their questions, convincing them regarding product features, etc..

- Code of conduct training – to help learners analyze situations, decide if there has been a breach of the policy/rule, and take appropriate action

Scenario-based learning can be used at the following levels of Bloom’s taxonomy:

- Application
- Synthesis
- Evaluation
LEAD (Learning through Exploration And Discovery)

LEAD or Inquiry-based learning provides learners the flexibility to discover and assimilate knowledge by interacting with the learning environment.

This strategy gives learners autonomy over their learning. It provides them the flexibility to acquire knowledge, based on their current needs and preferences.

Elements involved:
- The setting
- Clickable elements that can be explored

A few situations where LEAD can be used:
- When learners need to be familiarized with a particular place/product
- To provide learners the flexibility of learning at their own pace without restricting the course navigation or menu
Types of training it is recommended for:

- New employee orientation – to help learners familiarize themselves with the workplace, organizational policies, and make them feel welcome

- Safety training – to help learners familiarize themselves with various safety hazards, precautionary measures, PPE (Personal Protective Equipment) and exit routes to be used, etc.

- Product training – to help service technicians learn about the various aspects of a product, its functioning, maintenance, and replacement

- Site training – to help learners find their way through a new location (especially factories, warehouses, hazardous areas)

LEAD can be used at the following levels of Bloom’s taxonomy:

- Knowledge
- Comprehension
CASE STUDIES

A case study offers a setting and a context to learning, and helps learners immediately apply the knowledge gained; this leads to obtaining the desired results, be it making decisions or improving conditions.

A case study can be fictitious or based on real incidents; it can spans the entire course and even be used in assessments to test learners on the knowledge gained.

Elements involved:
- The case (or the problem being tackled; including the setting and characters)
- Questions/scenarios that learners need to analyze and act on

A few situations where case studies can be used:
- When learners need to take decisions or select a course of action from several available
- When the task involves the participation of a group of people rather than individuals
- When learners need to understand their roles and work in collaboration
Types of training it is recommended for:

- Process training – to help learners understand the drawbacks in the current system and develop improvements or devise a new system

- Compliance training – to help learners understand why an incident occurred, what can be done to avoid such incidents in the future, and what is to be done if they occur

- Leadership training – to help new leaders understand the significance of their role, and help them mentor subordinates, give feedback, build credibility, etc.

Case studies can be used at the following levels of Bloom’s taxonomy:

- Application
- Evaluation
- Synthesis
An organizational story is a detailed narrative of past management actions, employee interactions, or other intra or extra-organizational events that are communicated informally within the organization.  
*(Swap, Leonard, Shields, & Abrams, 2001)*

Stories are effective to transfer tacit knowledge such as organizational culture, values, and managerial systems. They let employees enjoy new experiences, form opinions, make judgments, and develop their own beliefs and attitudes.

Storytelling involves the use of the following to facilitate knowledge transfer:
- Scenarios
- War stories (personal experiences, stories from the field)
- Anecdotes
- Case studies

A few situations where stories can be used:
- When learners need to transform tacit knowledge into something actionable to be applied to their jobs
- To address learners’ concerns about new working conditions (such as new software, processes, tools, etc.)
- To bring about behavioral changes

STORYTELLING

Types of training it is recommended for:

- New employee orientation – to help new hires gain an overall understanding of the organization, its vision, mission, and the various departments.

- Anti-harassment training – to foster a harmonious workplace by ensuring all employees understand and inculcate equality and inclusivity at the workplace.

- Change management training – to address employees’ apprehensions regarding change and explain the benefits of the new software through success stories.

Storytelling can be used at the following levels of Bloom's taxonomy:

- Knowledge
- Comprehension
- Application
GAME-BASED LEARNING

Game-based learning involves the use of game elements to facilitate effective knowledge transfer, build an emotional connection, elicit responses from learners, foster competition, and help retain knowledge longer.

Both content and assessments can be gamified in e-learning. Game-based learning can refer to the content being gamified using game elements such as points, levels, scores, and leader boards.

Elements involved:

- The setting and context of the game
- Rules, scores, levels

A few situations where game-based learning can be used:

- To ensure high impact learning delivery and longer retention
- When competition plays a major role in driving business results such as sales and operational efficiencies
Types of training it is recommended for:

- Information training – to help learners understand the importance of data security and ensure they abide by the guidelines
- Code of conduct training – to help learners identify the gray areas and avoid them when dealing with external parties and vendors
- Sales/Product training – to help sales reps gain knowledge and increase their motivational levels through competition

Game-based learning can be used at the following levels of Bloom’s taxonomy:

- Knowledge
- Comprehension
- Application
Simulations provide learners a safe environment that mirrors the actual system to help them practice using the system/product without any repercussions.

Simulations are used to help learners become familiar with new software, complicated and heavy machinery, or complex products that they need to handle in real life. Since learners get to try out the system in a fail-safe environment prior to going live, it:

- Builds their confidence in using the system
- Equips them with knowledge that can be readily applied on-the-job
- Reduces costly errors and downtime in real life

Elements involved:
- The simulated environment with prompts
- Characters and scenarios, if needed

Watch-Try-Do Simulations:
1. In the **Watch** phase, learners view a demonstration of the system
2. In the **Try** phase, learners execute the steps on their own, aided by prompts and message callouts
3. In the **Do** phase, learners execute the steps without any guidance

Read more on [simulations](#) here.
Types of training it is recommended for:

- **ERP/Software training** – to help learners become adept at using the system based on their individual roles
- **Product training** – to help sales reps and service technicians become proficient at handling the product
- **Safety training** – to help service personnel become familiar with operating various equipment

Simulations can be used at the following levels of Bloom’s taxonomy*:

- Knowledge
- Application
Unit 3

How to Select the right ID Strategy
Choosing the right instructional design strategy is as important as using an instructional design strategy. A strategy is chosen after taking some considerations into account. These considerations include:

1. Audience
2. Subject
3. Learning environment
4. Parameters/constraints
1. Audience
The most basic differentiation is between children (pedagogy) and adults (andragogy), with adult learning being self-directed rather than assisted.

Other differences to be considered in corporate training:

<table>
<thead>
<tr>
<th>Blue-collared workers</th>
<th>vs.</th>
<th>White-collared workers</th>
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<tr>
<td>Strategies should take into account the following differences:</td>
<td></td>
<td></td>
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<tr>
<td>Manual workers</td>
<td></td>
<td>Professionals with desk jobs</td>
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<tr>
<td>Can be skilled and unskilled</td>
<td></td>
<td>Academically qualified</td>
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<tr>
<td>Can be temporary/contract employees</td>
<td></td>
<td>Permanent employees</td>
</tr>
<tr>
<td>Tech savvy employees</td>
<td>vs.</td>
<td>Computer-illiterate employees</td>
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<tr>
<td>Enjoy the latest, sophisticated strategies</td>
<td></td>
<td>Appreciate a simple, non-technical, easy-to-follow strategy</td>
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<tr>
<td>Single cultural group</td>
<td>vs.</td>
<td>Multi-cultural group</td>
</tr>
<tr>
<td>Any strategy can be employed</td>
<td></td>
<td>Need a strategy that takes into account cultural and regional differences</td>
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How to Select the Right ID Strategy

2. Subject
From a pedagogical standpoint, certain subjects require a lot of practice (e.g. Mathematics), while there are others that require other skills such as listening (e.g. Music), or observation and validation (e.g. Science).

In a corporate setting, the instructional design strategy must be based on the course category (e.g. soft skills, technical skills, business/leadership development skills, selling skills).

3. Learning Environment
Learning can take place anywhere. In a corporate setting, online learning can take place at a workstation, while travelling, on several types of devices, or even in a computer lab. Learning can also take place collaboratively or alone (self-learning).

4. Parameters/Constraints
An eLearning company’s success depends on its ability to create an eLearning course or program, within the parameters drawn by the client organization. Some of the important parameters include time, cost, and technical specifications.

When working under the strict confinements of time, cost, and technical specifications, these parameters become ‘constraints,’ and instructional designers are forced to restrain themselves to the use of only some strategies.
Unit 4

Case Studies
Training Type: Product Training

Client: Manufacturer of precision instruments

Subject: A new check weighing machine

Target audience: Sales reps

Strategy: The course uses a weight as the character, Mr. Gram, to engage learners. The character tells learners how the new machine is better than its predecessors and takes them into an in-depth discussion of its enhancements, working, and benefits.

It is also used in the formative assessments to provide learners detailed feedback based on their choices to reinforce learning.
**Training Type:** Compliance Training

**Client:** Electronics manufacturer

**Subject:** Information Security

**Target audience:** All employees

**Strategy:** The course deals with the importance of information security, its role in sustaining the organization’s trust and credibility, and the various information security policies in place. Learners are presented scenarios on various topics such as setting desktop passwords, locking documents with sensitive information, divulging employee information, etc.

In each scenario, after a short description of an incident, learners need to answer questions on the right usage of data, safety checks, and action steps.
SIMULATIONS

**Training Type:** ERP Training

**Client:** Leader in packaging solutions

**Subject:** New HRIS (Human Resource Information Systems) Tool

**Target audience:** Employees with no subordinates and 1 set of managers

**Strategy:** Employees and managers had separate courses. Each course had several modules where each module dealt with a set of related processes.

Each module starts with a set of ice-breaker questions to orient learners of what the processes deal with.

Watch simulations with message boxes, callouts, and highlights were used to show learners how to execute each step in each process, based on their roles and access privileges.
A strategy is a long-term game plan or high-level plan to achieve one or more goals through the efficient and effective use of available resources.

An instructional strategy is a high-level plan of how a subject must be taught. It refers to the methods, techniques, and devices used to instruct learners.

An instructional design model is a set of guidelines that help instructional designers to approach, structure, and design a course based on sound instructional design principles.

Choosing the right instructional design strategy is as important as using an instructional design strategy. A strategy is chosen after taking some considerations into account. These considerations include:

1. Audience
2. Subject
3. Learning environment
4. Parameters/Constraints
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‘Become an eLearning Champion’, dedicated to learning professionals, is a distillation of CommLab India’s 20 years’ experience in instructional design, eLearning, corporate training, and technology-enabled learning.

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